

eMARS TBL/ISG Kick-off

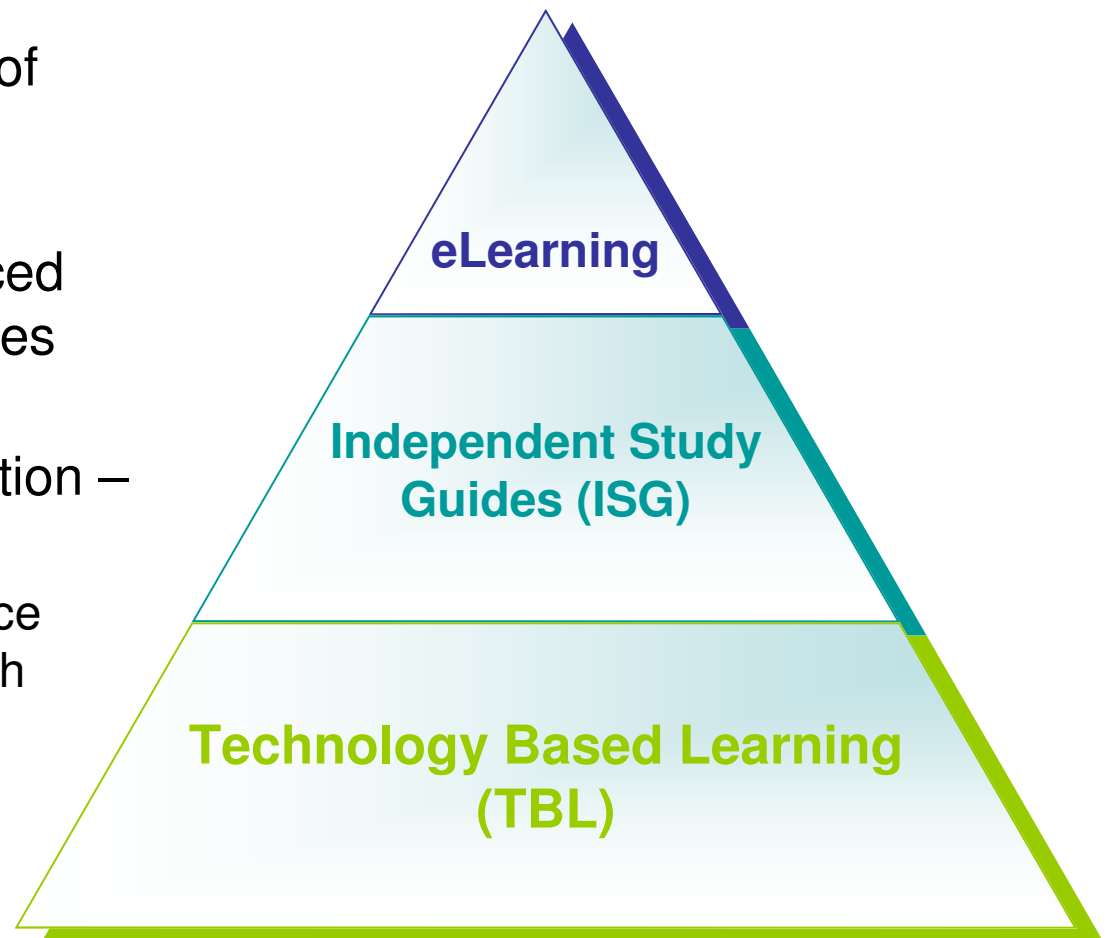


Agenda

1. Expectations & Logistics
2. Introduction to CGI-AMS Learning Forum
<http://learningforum.ams.com>
 - Accessing TBLs & ISGs
 - Self-paced Learning Walk-through
3. Reminders
 - ♦ **Accessing Self-paced Learning (TBL & ISG)**
 - ♦ Internet Explorer – available outside firewall
 - ♦ **All links are available from the eMARS website**
 - ♦ TBLs are available continuously
 - ♦ **ADV Fin ISGs** are integrated with the Advantage Online Help
 - ♦ User ids & passwords emailed

Learning Objectives

- ♦ Introduction to major functions/business areas of ADV Financial (eMARS)
- ♦ **TBLs:** Foundation for subsequent, more advanced instructor-facilitated courses
- ♦ **TBLs & ISGs:** Hands-on learning using the application – Do & Explore!
 - ♦ Learning at your own pace and desired level of depth



Courses Available: ADV Financial

Business Areas:

- ◆ Getting Started (4 ISGs)
- ◆ Chart of Accounts
- ◆ General Accounting
- ◆ Budgeting
- ◆ Procurement (2 ISGs)
- ◆ Accounts Payable
- ◆ Accounts Receivable
- ◆ Cost Accounting
- ◆ Fixed Assets
- ◆ Inventory (2 ISGs)
- ◆ Treasury Accounting

Please Note:

- ◆ Begin with GS, COA, & GA
- ◆ TBL courses average 2 hours each
- ◆ ISG courses average 3 hours each
- ◆ Make time to DO and EXPLORE
- ◆ Complete each course in one or two sessions

Prerequisites:

- ◆ **3 Core business area ISGs:** Getting Started, Chart of Accounts & General Accounting
- ◆ **Vendor/Customer Setup:**
 - ◆ AP, AR, Procurement classes

Suggested Courses: eMARS

Business Areas:

- ◆ Getting Started (4 ISGs)
- ◆ Chart of Accounts
- ◆ General Accounting
- ◆ Procurement (2 ISGs)
- ◆ Accounts Payable
- ◆ Accounts Receivable
- ◆ Cost Accounting
- ◆ Fixed Assets
- ◆ Inventory (2 ISGs)

Prerequisites:

- ◆ **3 Core business area ISGs:** Getting Started, Chart of Accounts & General Accounting
- ◆ **Vendor/Customer Setup:**
 - ◆ AP, AR, Procurement classes

Please Note:

- ◆ Begin with GS, COA, & GA
- ◆ Focus on the courses applicable to your department
- ◆ *Budgeting and Treasury Accounting do not apply to eMARS*
- ◆ TBL courses average 2 hours each
- ◆ ISG courses average 3 hours each
- ◆ Make time to DO and EXPLORE
- ◆ Complete each course in one or two sessions

CGI-AMS Learning Forum: Register First Time Users

Welcome to the CGI-AMS Learning Forum

Welcome to the CGI-AMS Learning Forum! First time visitors should [Register](#) in the Learning Forum to create a user profile and login.




Login ID:

Password:

[Forgot Login?](#) | [Forgot Password?](#)

CGI-AMS Learning Forum

REGISTER
Establish Login & Password



To begin registration, type a Login ID and Password. You will enter these each time you access the site. Your Login ID and Password should consist of at least four letters and/or numbers. Your Password is case-sensitive. *Please use your Enterprise ID as your Learning Forum login. Please choose a password other than your Enterprise password.*

Login ID:

Password:

Confirm Password:

[Use of this site signifies your agreement to the access agreement.](#)

© 2000-2004 Meridian KSI

1. Access URL: <http://learningforum.ams.com>
2. Click on [Register](#) link
3. Enter Login ID
4. Enter Password twice to confirm
5. Click on Submit button

Kentucky staff:

Login ID = Initial First Name + Initial Middle Name + Last Name

Password = Minimum 4 Letters and/or Numbers



CGI-AMS Learning Forum: Register First Time Users

CGI-AMS Users

- 1) Select 'CGI-AMS' from the **Affiliation Group** drop-down.
 - 2) Click the **Expand** button.
 - 3) Select the product that you most often work with from the **Affiliation** field.
- Note:** Only choose '01-All Products' if you don't work with one product any more often than another.
- 4) Click the **Select** button to the right of the **Affiliation** field.

Client or Partner Users

- 1) Select 'Client' or 'Partner' from the **Affiliation Group** drop-down.
 - 2) Click the **Expand** button.
 - 3) Select your organization's name from the **Affiliation** drop-down.
- Note:** If your organization's name is not listed in the drop-down then select '0 Not Listed' from the drop-down and enter your organization's name in the **Other Affiliation** field.
- 4) Click the **Select** button to the right of the **Affiliation** field.

Affiliation Group: CGI-AMS

Affiliation: 0 Not Listed

(Select the product you use most)

Other Affiliation:

1. Populate all fields with an * to the left.
2. **Current Focus** should be populated with 'Learner Only'
3. Click the **Submit** button

1. Populate the **Affiliation** fields
2. Click the **Select** button

As part of the registration process, you need to provide some general information. Please fill in the fields below and click the **Submit** button. Only fields with a '*' to the left of the label are required for registration.

* **First Name:**

* **Last Name:**

* **Email Address:**

☒ *Send me updates and notification of content changes at this email address.*

* **Current Focus:** Select Current Focus
Registrants: Enter 'Learner Only' in this field. Candidates for certification focus will be determined by managers.

Address 1:

Address 2:

City:

State:

Province/Other:

Zip:

Country: (Select one)

Phone:

Fax:

Manager's Email:

* **User Interface:** ☒ Graphical ☐ Text

☒ *Make this information available to others in the User Directory.*

☒ *Make this information available to others in the PeerNet.*

CGI-AMS Learning Forum: Login

Welcome to the CGI-AMS Learning Forum

Welcome to the CGI-AMS Learning Forum! First time visitors should [Register](#) in the Learning Forum to create a user profile and login.



Login ID:

Password:

[Forgot Login?](#) | [Forgot Password?](#)

1. Enter Login ID
2. Enter Password
3. Click the Submit button.

Configuration Notes:

Kentucky Users:

- ❑ Use 1st Initial First Name + 1st Initial Middle Name + Last Name

Passwords: Must be at a minimum 4 characters and/or numbers

Attend Courses: Technology Based Learning (TBLs)

The image displays two screenshots of the CGI-AMS Learning Center web application. The left screenshot shows the 'Learning Center' link highlighted in the left navigation panel. The right screenshot shows the 'Course Information & Enrollment' link highlighted in the main content area.

Left Screenshot: CGI-AMS Learning Center

Navigation Panel (Left):

- Administration
- Career Center
- Coffee Shop
- Conference Center
- Learning Center**
- Lecture Hall
- Library
- Teaming Center

Main Content Area (Right):

CGI-AMS Learning Center

Previous Month

View Week 25

View Week 2

View Week 9

Top 10

- Contributors
- Resources
- Searches

Connie Camden (CAMDC001)

Right Screenshot: CGI-AMS Learning Center

Navigation Panel (Left):

- Administration
- Career Center
- Coffee Shop
- Conference Center
- Learning Center**
- Lecture Hall
- Library
- Teaming Center

Main Content Area (Right):

Notes & Assignments

Course Information & Enrollment

Software & Plug-ins

Curriculums

Course Bookmarks

Top 10

- Contributors
- Resources
- Searches

1. Select the **Learning Center** link in the left-navigation panel
2. Select the **Course Information & Enrollment** link

Attend Courses: Technology Based Learning (TBLs)

The screenshot displays the CGI AMS Learning Center interface. The top navigation bar includes links for Info, Home, Master Calendar, Index, Help, IDP, Glossary, Feedback, Notepad, Research, and Logout, along with a 'Select a function' dropdown. The left navigation panel lists various sections: Administration, Career Center, Coffee Shop, Conference Center, Learning Center, Lecture Hall, Library, and Teaming Center. Below this, there are links for Announcements, Calendar/Enroll, My Learning Forum, Surveys, and What's New. A 'Top 10' section lists contributors, resources, and searches. The main content area is titled 'LEARNING CENTER Course Information & Enrollment' and features a 'Return to Learning Center' link. It includes a search form with a 'Topic' dropdown set to '02 - Advantage Financial', a 'Keywords' input field, and a 'Search' button. Below the search form, there is a list of search results, including ISG and TBL courses. The bottom of the page shows a footer with links for Course Bookmarks, Course Information & Enrollment, Curriculums, and Master.

CGI AMS

Info Home Master Calendar Index Help IDP Glossary Feedback Notepad Research Logout Select a function

Administration
Career Center
Coffee Shop
Conference Center
Learning Center
Lecture Hall
Library
Teaming Center

Announcements
Calendar/Enroll
My Learning Forum
Surveys
What's New

Top 10

- Contributors
- Resources
- Searches

Connie Camden (CAMDC001)

LEARNING CENTER
Course Information & Enrollment

[Return to Learning Center](#)

Topic: 02 - Advantage Financial

Keywords: All Words

Search

To search for courses, complete the [search criteria](#), then click **Search**. From the resulting list, click the information icon for details. To start an online course, click the title. To enroll in a classroom course, click the information icon, then click the Enroll link next to the section you wish to be enrolled in.
Note: If the section you wish to enroll is full, you may click the Waitlist link to be added to the waiting list for the course. When a space becomes available, you will be automatically enrolled and notified via email.

[ISG: AFin General Accounting](#) [Online]
[ISG: AFin Accounts Payable](#) [Online]
[ISG: AFin Accounts Receivable](#) [Online]
[ISG: AFin Chart of Accounts](#) [Online]
[ISG: AFin Cost Accounting](#) [Online]
[ISG: AFin Fixed Assets](#) [Online]
[ISG: AFin Getting Started - Database & Components](#) [Online]
[ISG: AFin Getting Started - Documents](#) [Online]
[ISG: AFin Getting Started - Orientation](#) [Online]
[ISG: AFin Getting Started - Personalization & Navigation](#) [Online]
[ISG: AFin Inventory](#) [Online]
[ISG: AFin Procurement](#) [Online]
[TBL: AFin Getting Started](#) [Online]
[TBL: AFin Accounts Payable](#) [Online]
[TBL: AFin Accounts Receivable](#) [Online]
[TBL: AFin Budgeting](#) [Online]
[TBL: AFin Chart of Accounts](#) [Online]
[TBL: AFin Cost Accounting](#) [Online]

Course Bookmarks | Course Information & Enrollment | Curriculums | Master

1. Select the **Learning Center** link in the left-navigation panel
2. Select the **Course Information & Enrollment** link
3. Select **02-Advantage Financial** in the **Topic** field
4. Click the **Search** button
5. Select the link for the TBL course in the search results

Attend Courses: Technology Based Learning (TBLs)

TBL: AFin Fixed Assets

Description:

User name: fiverguest

Password: training

Introduction to the business area. Focus on FA Basics, Life Cycle, Setup, Documents, Registry & Journals. Self paced, self study in a simulated training environment; questions & Watch/Try simulations with corrective feedback - hands on; Flash movie demonstrations, programmed quiz.

You should complete the following **PREREQUISITES** before completing this course:

(1)TBL: AFin Getting Started (2)TBL: AFin Chart of Accounts (3)TBL: AFin General Accounting (4)TBL: AFin Budgeting

Select the **Take Course** button to begin the course described above, or click **Return** to go back to the online course listing.

 Take Course

[Return to Course Information & Enrollment](#)

1. Select the **Take Course** button

Attend Courses: Independent Study Guides (ISGs)

ISG: AFin Chart of Accounts

Description:

Project team study & exploration in the business area. Focus on COA Basics, Classifications, Setup, Extended Features. Self-paced, self study in a live baseline AMS Advantage environment. Hands-on. Programmed, graded quiz. Virtual Office Hours (up to 10 hours total) provided across all 200 series courses as part of the license fee. Application can be accessed from anywhere.

You should complete the following **ISG PREREQUISITES** before completing this course:

- (1) ISG: Getting Started - Orientation
- (2) ISG: Getting started - Documents
- (3) ISG: Getting Started - Database & Components
- (4) ISG: Getting Started - Personalization & Navigation

We also recommend the use of the corresponding Getting Started and Chart of Accounts **TBL courses** as great learning resources.

Select the **Take Course** button to begin the course described above, or click **Return** to go back to the online course listing.

 Take Course

[Return to Course Information & Enrollment](#)

[Return to ISG: Advantage Financial Room](#)


Documents

0 records found.

Presentations

0 records found.

Web Sites

-  [Training Environment 1](#)
-  [Training Environment 2](#)
-  [Training Environment 3](#)

Linked Content

There are currently no linked content items.

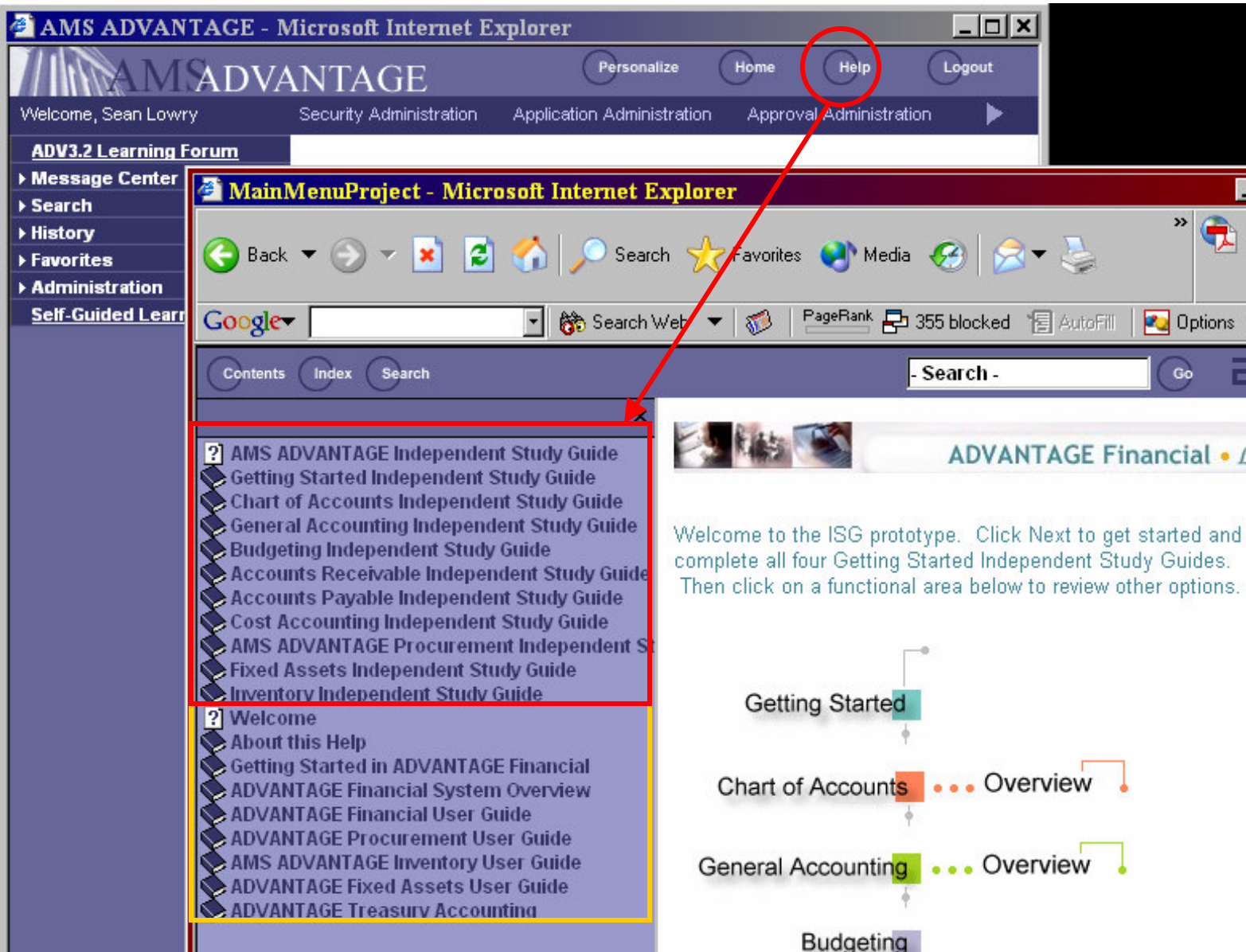
ADV Financial:

There are three (3) environments to choose from to complete ISGs.

Choose the environment to which you have been assigned.

1. Select the **Learning Center** link in the left-navigation panel
2. Select the **Course Information & Enrollment** link
3. Select **02-Advantage Financials** in the **Topic** field
4. Click the **Search** button
5. Select the link for the ISG course in the search results
6. Select the **Take Course** button

ADV Fin: ISG Walkthrough



The screenshot displays the AMS ADVANTAGE web application interface within a Microsoft Internet Explorer browser window. The main menu at the top includes links for Personalize, Home, Help (circled in red), and Logout. Below the main menu, there are navigation links for Security Administration, Application Administration, and Approval Administration. A sidebar on the left contains links for Message Center, Search, History, Favorites, Administration, and Self-Guided Learning. The main content area shows a list of Independent Study Guides (ISGs) under the heading "AMS ADVANTAGE Independent Study Guide". A red box highlights the list of ISGs, and a yellow box highlights the "Welcome" section. A red arrow points from the "Help" link in the main menu to the "AMS ADVANTAGE Independent Study Guide" link in the sidebar.

AMS ADVANTAGE - Microsoft Internet Explorer

AMS ADVANTAGE

Welcome, Sean Lowry

Security Administration Application Administration Approval Administration

ADV3.2 Learning Forum

Message Center

Search

History

Favorites

Administration

Self-Guided Learning

MainMenuProject - Microsoft Internet Explorer

Back Forward Stop Reload Home Search Favorites Media AutoFill Options

Google Search Web PageRank 355 blocked AutoFill Options

Contents Index Search

Search - Go

AMS ADVANTAGE Independent Study Guide

- Getting Started Independent Study Guide
- Chart of Accounts Independent Study Guide
- General Accounting Independent Study Guide
- Budgeting Independent Study Guide
- Accounts Receivable Independent Study Guide
- Accounts Payable Independent Study Guide
- Cost Accounting Independent Study Guide
- AMS ADVANTAGE Procurement Independent Study Guide
- Fixed Assets Independent Study Guide
- Inventory Independent Study Guide

Welcome

- About this Help
- Getting Started in ADVANTAGE Financial
- ADVANTAGE Financial System Overview
- ADVANTAGE Financial User Guide
- ADVANTAGE Procurement User Guide
- AMS ADVANTAGE Inventory User Guide
- ADVANTAGE Fixed Assets User Guide
- ADVANTAGE Treasury Accounting

ADVANTAGE Financial

Welcome to the ISG prototype. Click Next to get started and complete all four Getting Started Independent Study Guides. Then click on a functional area below to review other options.

Getting Started

Chart of Accounts Overview

General Accounting Overview

Budgeting

CGI AMS

ADV Fin: ISG Walkthrough

AMS ADVANTAGE Independent Study Guide

Getting Started Independent Study Guide

Getting Started Orientation

Getting Started Documents

Getting Started Documents - Expectations

Getting Started Documents - Orientation

Getting Started Documents - Interaction

Getting Started Documents - Optional Exercises

Getting Started Documents - Review

Getting Started Documents - Assessment

Getting Started Database & Components

Getting Started Personalization & Navigation

Chart of Accounts Independent Study Guide

General Accounting Independent Study Guide

Budgeting Independent Study Guide

Accounts Receivable Independent Study Guide

Accounts Payable Independent Study Guide

Cost Accounting Independent Study Guide

AMS ADVANTAGE Procurement Independent Study Guide

Fixed Assets Independent Study Guide

Inventory Independent Study Guide

Welcome

About this Help

Getting Started in AMS Advantage

ADVANTAGE Financial System Overview

ADVANTAGE Financial User Guide

ADVANTAGE Procurement User Guide

AMS ADVANTAGE Inventory User Guide

ADVANTAGE Fixed Assets User Guide

ADVANTAGE Treasury Accounting

ADVANTAGE Financial • *Learning forum*

Getting Started - Documents

Menu Back Next

Expectations

Logistics

Recommendations

Prerequisites

You have completed the following course:

OVW100 – Getting Started – Orientation

Estimated Learning Time: 4.5 hours

Training Calendar

Key Information

Click here to view the [Key Information](#) common to all Independent Study Guides.

ADV Fin: ISG Walkthrough

[illegible]

ADV Fin: ISG Walkthrough

The screenshot displays the ADVANTAGE Financial Learning forum interface. On the left is a sidebar titled 'AMS ADVANTAGE Independent Study Guide' with a search bar and a list of topics. The main content area features a header with 'ADVANTAGE Financial • Learning forum' and a search bar. Below the header, the 'Interaction' section explains the role of the AMS Sidebar and the Assignments column. The 'Assignments' section lists three tasks: reviewing learning objectives, reading the ADVANTAGE Financial Home Page, and reading specific document sections.

Contents **Index** **Search**

AMS ADVANTAGE Independent Study Guide

- Getting Started Independent Study Guide
 - Getting Started Orientation
 - Getting Started Documents
 - Getting Started Documents - Expectations
 - Getting Started Documents - Orientation
 - Getting Started Documents - Interaction
 - Getting Started Documents - Optional Exercise
 - Getting Started Documents - Review
 - Getting Started Documents - Assessment
 - Getting Started Database & Components
 - Getting Started Personalization & Navigation
- Chart of Accounts Independent Study Guide
- General Accounting Independent Study Guide
- Budgeting Independent Study Guide
- Accounts Receivable Independent Study Guide
- Accounts Payable Independent Study Guide
- Cost Accounting Independent Study Guide
- AMS ADVANTAGE Procurement Independent Study Guide
- Fixed Assets Independent Study Guide
- Inventory Independent Study Guide
- Welcome
- About this Help
- Getting Started in ADVANTAGE Financial
- ADVANTAGE Financial System Overview
- ADVANTAGE Financial User Guide
- ADVANTAGE Procurement User Guide
- AMS ADVANTAGE Inventory User Guide
- ADVANTAGE Fixed Assets User Guide
- ADVANTAGE Treasury Accounting

Interaction

The Assignments column below drives your progression through the Interaction ISG. The AMS Sidebar is ancillary to the assignments. As you click on the a links to access the product documentation, use your browser's Back button to to Interaction page and proceed to the next assignment step.

AMS Sidebar

Use of the AMS Sidebar

The purpose of the AMS Sidebar is to provide you with important information related to the assignment topics. Content in this section appears in parallel (or next to) with the assignment it pertains to. The sidebar also includes knowledge checkpoints, or questions, to stimulate thought and verify your understanding of key concepts. You should read the sidebar information items and knowledge checkpoints as you reach the assignments that are displayed in parallel.

Assignments

The study material below references the online Help documentation sources [Getting Started in Advantage Financial](#) and [ADVANTAGE Financial System Overview](#). These sources contain information on the same topics that go hand-in-hand.

1. Review the Learning Objectives for this course above.
2. Read [ADVANTAGE Financial Home Page](#) to become familiar with the uses of Primary and Secondary Navigation Panels.

Familiarization with Documents and the Document Catalog

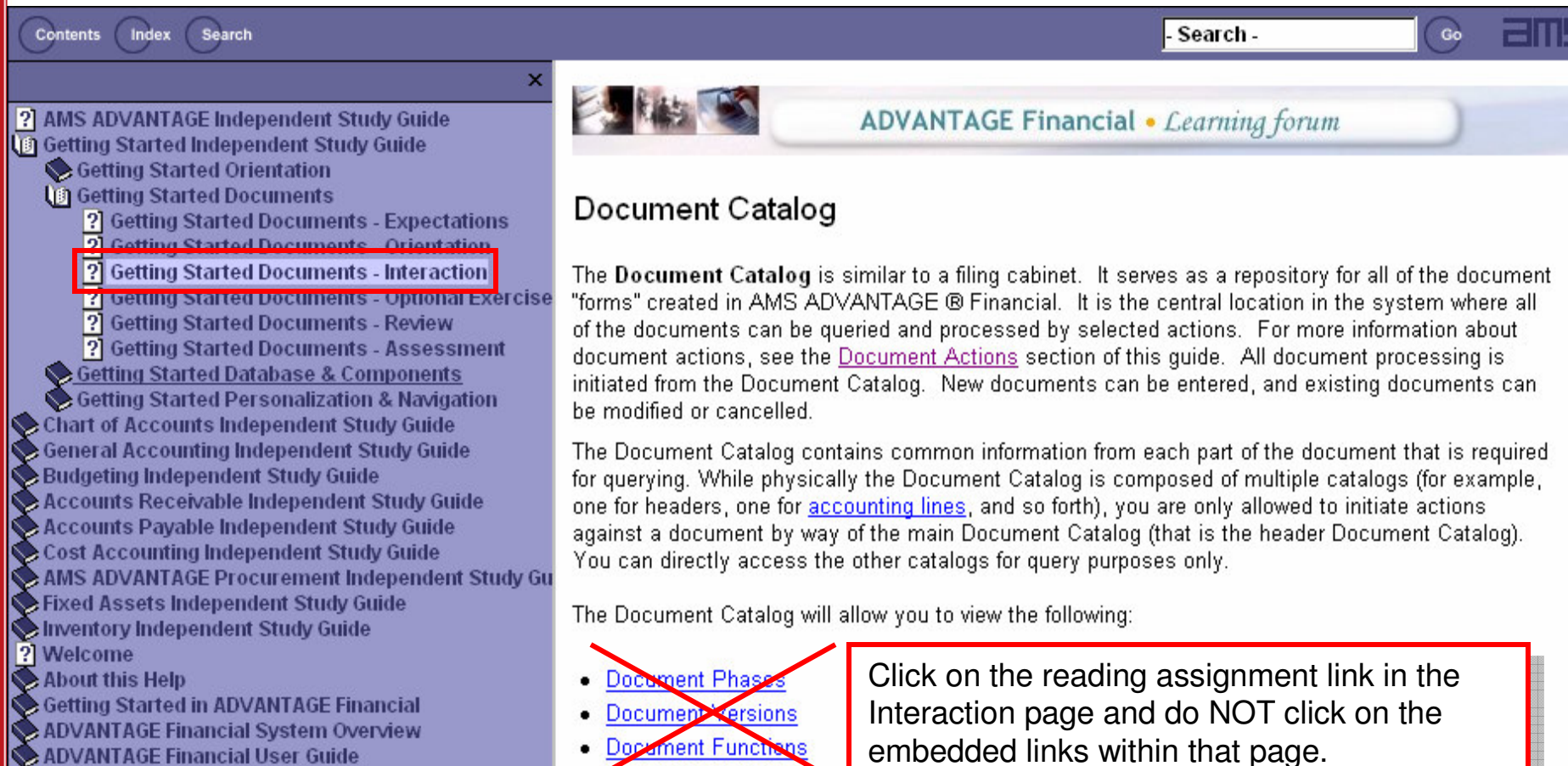
3. Read the following sections on what a document is:

Assignments:

Drives your progression through the reading assignments.

Sidebar: Supplemental information is presented that corresponds to the adjacent reading assignment.

ADV Fin: ISG Walkthrough



Contents Index Search

- Search - Go

AMS

ADVANTAGE Financial • Learning forum

Document Catalog

The **Document Catalog** is similar to a filing cabinet. It serves as a repository for all of the document "forms" created in AMS ADVANTAGE @ Financial. It is the central location in the system where all of the documents can be queried and processed by selected actions. For more information about document actions, see the [Document Actions](#) section of this guide. All document processing is initiated from the Document Catalog. New documents can be entered, and existing documents can be modified or cancelled.

The Document Catalog contains common information from each part of the document that is required for querying. While physically the Document Catalog is composed of multiple catalogs (for example, one for headers, one for [accounting lines](#), and so forth), you are only allowed to initiate actions against a document by way of the main Document Catalog (that is the header Document Catalog). You can directly access the other catalogs for query purposes only.

The Document Catalog will allow you to view the following:

- [Document Phases](#)
- [Document Versions](#)
- [Document Functions](#)

Click on the reading assignment link in the Interaction page and do NOT click on the embedded links within that page.

ADV Fin: ISG Walkthrough

The screenshot shows the AMS ADVANTAGE user interface. At the top, there are navigation links for 'Contents', 'Index', and 'Search', along with a search bar and a 'Go' button. On the left, a sidebar lists various guides, including 'Getting Started' documents and 'Independent Study Guides'. The main content area displays text about the 'Document Catalog' and 'Accounting Lines'. Several callout boxes provide specific instructions:

- Mouse over link:** If the bottom status bar contains a URL then do not click on the link. This callout points to a status bar showing the URL: `http://192.135.40.146/webapp/trng35f1/advantage/Advantage/Help/MainHelp/ADV_Fin_System_Overview/Document_Actions.htm`.
- Mouse over link:** If the bottom status bar contains the verbiage 'javascript:void(0)'. Then clicking on the link will bring up a popup box. This callout points to a status bar showing `javascript:void(0);`.
- Document Actions:** A red box highlights the 'Document Actions' link in the text.
- Accounting Line:** A yellow box highlights the 'accounting lines' link in the text.

The text in the main content area describes the 'Document Catalog' as a repository for document 'forms' and explains the 'Accounting Line' as a level in a document for entering account codes.

ADV Fin: ISG Walkthrough

Accounting and Document Templates

An example Accounting Template and Document Template have been created for you. The Accounting Template is TxxE (where xx is your learner #). The Document Template found in the Document Catalog is PO 150 1300 RD HWY CONST MATS.

Check

- ✓ Are there reasons, other than reduced manual data entry, why Document and Accounting Templates are beneficial?
- ✓ For which document types are Document Triggering Templates common and useful?

Automation & Reduction of Data Entry

12. Read the following sections on the use of document and accounting templates to reduce manual data entry:

- [Document Templates](#)
- [Accounting Templates](#)
- [Using Document and Accounting Templates](#) **book**
- [Viewing Available Templates](#)
- [Creating and Modifying Document Templates](#)

If the word '**book**' appears after the reading assignment click on the embedded links within the reading assignment page.

NOTE: This is the only scenario where clicking on the embedded links is recommended.

Using Document and Accounting Templates

Document and Accounting Templates

AMS ADVANTAGE @ Financial incorporates "quick codes" on all transactions by using accounting and document templates. These provide data entry shortcuts. Accounting templates help you enter accounting lines, while document templates help you complete documents quicker because certain data is already entered for you. This section of the User Guide will cover the following areas:

- [Viewing Available Templates](#)
- [Creating and Modifying Document Templates](#)
- [Creating and Modifying Accounting Templates](#)
- [Applying Accounting Templates to Documents](#)

ADV Fin: ISG Walkthrough

Creating Documents

Try doing what you read about by viewing, copying, and/or manipulating the PO document from step 6 or other documents you create. We suggest that when you create new documents, you use a Document ID that will distinguish your documents from others.



Check

- ✓ What is the difference between copying a document and copying forward a document?
- ✓ Do each create a new document of the same type as the original?

7. Read the following sections pertaining to the creation, modification, and cancellation of documents.

- [Creating a New Document from the Document Catalog](#)
- [Copy Document](#)
- [Copying Documents](#)
- [Copy Forward](#)
- [Creating a New Document From an Existing Document](#)

▶ Optional Exercise #2: [Creating a Document](#)

- [Modifying a Document](#). Here, use any document you have created or the PO document you opened in step 6.
- [Canceling a Document](#)

▶ Optional Exercise #3: [Modifying and Cancelling Documents](#)

ADV Fin: ISG Walkthrough

Exercise 2 – Creating a Document

Scenario:

You need to purchase 5 chairs that cost \$30 each.

Task:

Create a Purchase (PO) document for 5 chairs that cost \$30 each.

1. Click on Search: Document Catalog, click on the Create link and enter the following information in the appropriate subsection:

Required Fields	Values
Code	PU
Department Code	150
Unit	1300
ID	[learner id]_PU

2. Click Create.
3. Access the appropriate page and enter the following general information in the appropriate subsection:



Required Fields	Values
Document Name	Document creation exercise
Document Description	PU document created for training purposes.

4. Enter your userid (e.g., Leamer01) in the Requestor ID field (or select it from the pick list) located in the Contact subsection. Notice the Issuer ID information is already inferred and populated with your user information.

ADV Fin: ISG Walkthrough

MainMenuProject - Microsoft Internet Explorer

Back Forward Stop Reload Home Search Favorites Media RSS Print Mail Word PDF Options

Google Search Web PageRank 355 blocked AutoFill Options

Contents Index Search - Search - Go

AMS ADVANTAGE Independent Study Guide
Getting Started Independent Study Guide
Getting Started Orientation
Getting Started Documents
Getting Started Documents - Expectations
Getting Started Documents - Orientation
Getting Started Documents - Interaction
Getting Started Documents - Optional Exercise
Getting Started Documents - Review
Getting Started Documents - Assessment
Getting Started Database & Components
Getting Started Personalization & Navigation
Chart of Accounts Independent Study Guide
General Accounting Independent Study Guide
Budgeting Independent Study Guide
Accounts Receivable Independent Study Guide
Accounts Payable Independent Study Guide
Cost Accounting Independent Study Guide
AMS ADVANTAGE Procurement Independent Study Guide
Fixed Assets Independent Study Guide
Inventory Independent Study Guide
Welcome
About this Help
Getting Started in ADVANTAGE Financial
ADVANTAGE Financial System Overview
ADVANTAGE Financial User Guide
ADVANTAGE Procurement User Guide
AMS ADVANTAGE Inventory User Guide
ADVANTAGE Fixed Assets User Guide
ADVANTAGE Treasury Accounting

ADVANTAGE Financial • Learning forum

Getting Started - Documents Menu Back Next Exit

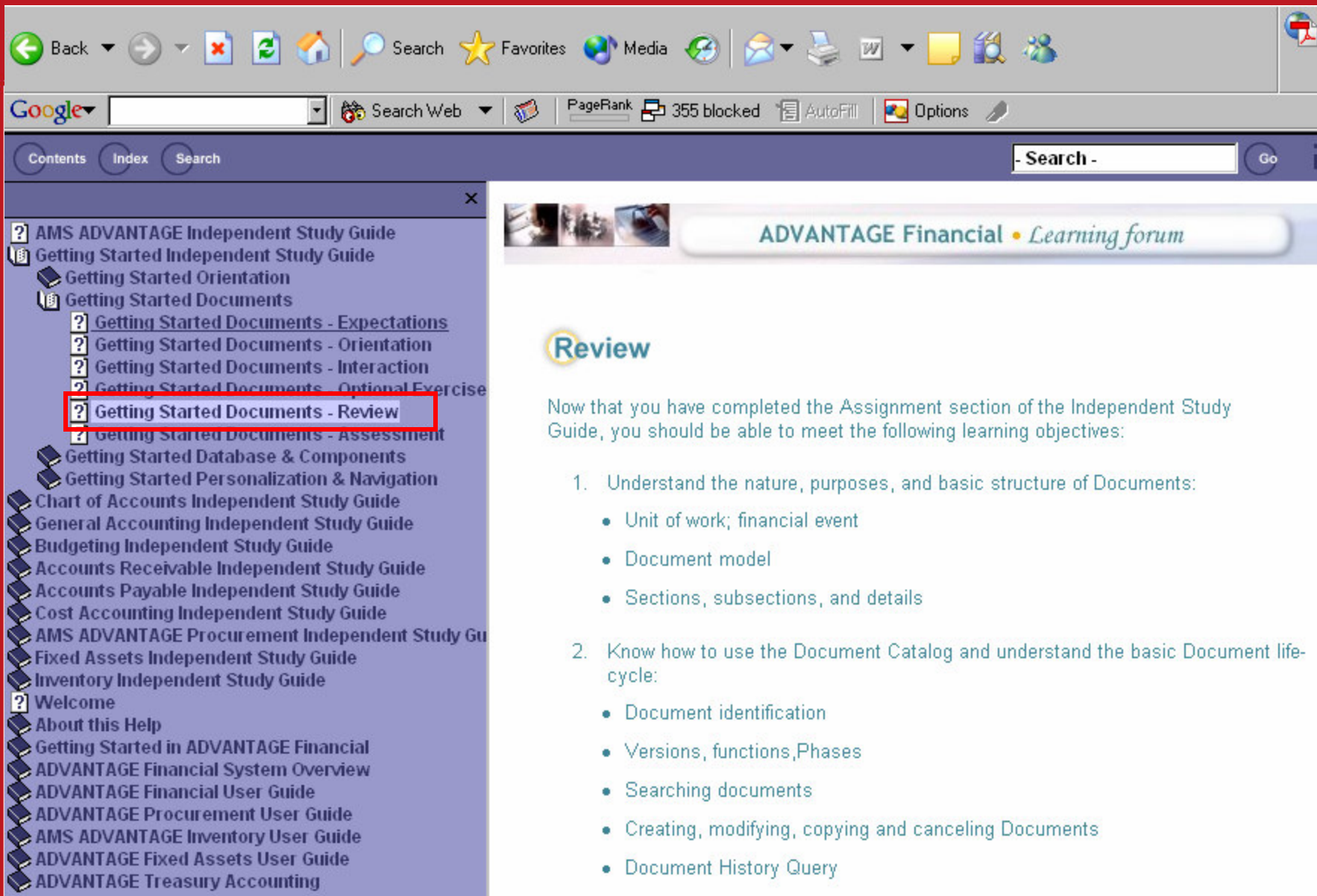
Optional Exercises

The following exercises are optional and therefore are not required for course credit. You can complete the exercises in the training environment for additional practice. You may also want to download the exercises for future reference. Click the **Next** button to navigate to the Review section of this ISG.

Right click on the link and choose **Save target as** from the popup menu to download the file. Choose the location where you want to save the file. After you have downloaded the file, open up the file in Microsoft Word and follow the instructions provided in the document. Or you can click on the link with your left mouse button to view the exercise in the browser window. After you are finished, click on the browser's **Back** button to return to this page.

- Optional Exercise #1: [Performing a Document Catalog Search](#)
- Optional Exercise #2: [Creating a Document](#)
- Optional Exercise #3: [Modifying and Cancelling Documents](#)

ADV Fin: ISG Walkthrough



Back Search Favorites Media 355 blocked AutoFill Options

Contents Index Search - Search - Go

AMS ADVANTAGE Independent Study Guide
Getting Started Independent Study Guide
Getting Started Orientation
Getting Started Documents
Getting Started Documents - Expectations
Getting Started Documents - Orientation
Getting Started Documents - Interaction
Getting Started Documents - Optional Exercise
Getting Started Documents - Review
Getting Started Documents - Assessment
Getting Started Database & Components
Getting Started Personalization & Navigation
Chart of Accounts Independent Study Guide
General Accounting Independent Study Guide
Budgeting Independent Study Guide
Accounts Receivable Independent Study Guide
Accounts Payable Independent Study Guide
Cost Accounting Independent Study Guide
AMS ADVANTAGE Procurement Independent Study Guide
Fixed Assets Independent Study Guide
Inventory Independent Study Guide
Welcome
About this Help
Getting Started in ADVANTAGE Financial
ADVANTAGE Financial System Overview
ADVANTAGE Financial User Guide
ADVANTAGE Procurement User Guide
AMS ADVANTAGE Inventory User Guide
ADVANTAGE Fixed Assets User Guide
ADVANTAGE Treasury Accounting

ADVANTAGE Financial • Learning forum

Review

Now that you have completed the Assignment section of the Independent Study Guide, you should be able to meet the following learning objectives:

1. Understand the nature, purposes, and basic structure of Documents:
 - Unit of work; financial event
 - Document model
 - Sections, subsections, and details
2. Know how to use the Document Catalog and understand the basic Document life-cycle:
 - Document identification
 - Versions, functions, Phases
 - Searching documents
 - Creating, modifying, copying and canceling Documents
 - Document History Query

ADV Fin: ISG Walkthrough

Back Search Favorites Media 355 blocked AutoFill Options

Contents Index Search - Search - Go

AMS ADVANTAGE Independent Study Guide
Getting Started Independent Study Guide
Getting Started Orientation
Getting Started Documents
Getting Started Documents - Expectations
Getting Started Documents - Orientation
Getting Started Documents - Interaction
Getting Started Documents - Optional Exercise
Getting Started Documents - Review
Getting Started Documents - Assessment
Getting Started Database & Components
Getting Started Personalization & Navigation
Chart of Accounts Independent Study Guide
General Accounting Independent Study Guide
Budgeting Independent Study Guide
Accounts Receivable Independent Study Guide
Accounts Payable Independent Study Guide
Cost Accounting Independent Study Guide
AMS ADVANTAGE Procurement Independent Study Guide
Fixed Assets Independent Study Guide
Inventory Independent Study Guide
Welcome

ADVANTAGE Financial • Learning forum

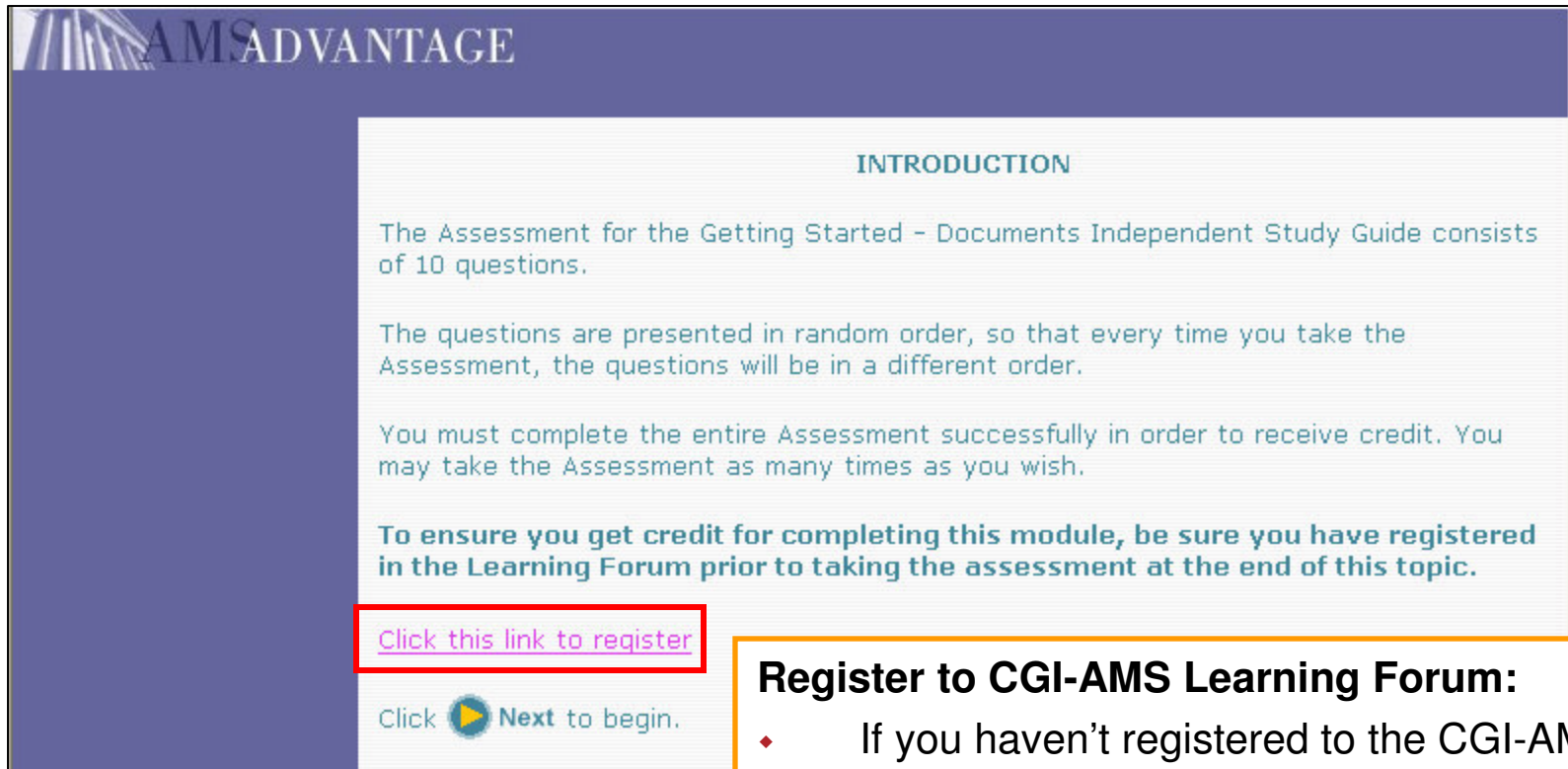
Getting Started - Documents Menu Back Next Exit


Assessment

Click on the **Quiz** link to link to the automated assessment for this ISG. After you have taken the quiz, right click on the **Evaluation** link and choose **Save target as** from the popup menu. Choose the location where you want to save the file. After you have downloaded the file, open up the file in Microsoft Word and follow the instructions provided in the document.

- Quiz**
- Evaluation

ADV Fin: ISG Walkthrough



The screenshot shows the AMS ADVANTAGE interface. The title 'AMS ADVANTAGE' is at the top left. The main heading is 'INTRODUCTION'. The text describes the Assessment for the Getting Started - Documents Independent Study Guide, which consists of 10 questions presented in random order. It states that users must complete the entire assessment successfully to receive credit and can take it as many times as they wish. A red box highlights the link 'Click this link to register'. At the bottom, there is a 'Click  Next to begin.' instruction.

AMS ADVANTAGE

INTRODUCTION


The Assessment for the Getting Started - Documents Independent Study Guide consists of 10 questions.

The questions are presented in random order, so that every time you take the Assessment, the questions will be in a different order.

You must complete the entire Assessment successfully in order to receive credit. You may take the Assessment as many times as you wish.

To ensure you get credit for completing this module, be sure you have registered in the Learning Forum prior to taking the assessment at the end of this topic.

[Click this link to register](#)

Click  **Next** to begin.

Register to CGI-AMS Learning Forum:


- ♦ If you haven't registered to the CGI-AMS Learning Forum please select the link [Click this link to register](#). Follow the instructions for registering from this presentation.
- ♦ Otherwise, click on the **Next** button.

ADV Fin: ISG Walkthrough

Question 1 ▶▶

Which of the following is NOT a type of wildcard that can be used in criteria fields to Search in ADVANTAGE?

- ☐ Asterisk (*)
- ☐ Comma (,)
- ☐ Greater than (>) and less than (<)
- ☒ Ampersand (&)

Correct. Click  Next to continue.

ADV Fin: ISG Walkthrough

Test Summary

You have completed the Assessment for the Getting Started - Documents Independent Study Guide.

You received an 90% on the Assessment. You must receive an 80% or higher to get credit and record completion in the Learning Forum.

[Submit Score](#)

Although you passed the Assessment, you would still benefit from reviewing the following questions (please click on a link to access the material to review):

- [The Document History Query...?](#)

If you would like to take the Assessment again, please click the following link: [Retake Assessment](#).

Get credit for completing ISG:

- Once you've received and **80% or higher** you will be provided the [Submit Score](#) link.
- Select the [Submit Score](#) link to get credit for completing the ISG.